SARS

IT3 Certificate Information (IT3-01)

South African Revenue Service

Certificates Details								,
IT3(b) – Income from Investments, Property Rights, Royalties and/or Withholding Tax on Interest How many certificates do you want to submit? (Limited to 20)	IT3(c) – Certificate of income in respect unit trust or other financial instruments	of the disposal of	IT3(e) – Income from Purchases / S Minerals / Precious Stones or bonu or Societies	Sales / Shipments of uses Paid / Accrued t	Livestock / Produce / Timt to Members of Co-Operativ	e Companies	IT3(s) –Tax Free Investmer	nt
Submitting Entity								۸
Year of Assessment	Period Start Date (CCYY-MM-DD)	Period End Date (CCYY-MM-DD)		Regu	ulator Designation			
Nature of Person		Registration No.		Regulator Registrat	tion Number			
Registered Name						Taxpayer Ref No.		
Trading Name							Universal Branch Code	
Contact Person								۸
Names								
Surname								
Bus Tel No. 1		Bus Tel No. 2			Cell No.			
Contact Email		<						
Postal Address								
							Postal Code	

IT3 Accou	unt Holder Det	tails																۸
	pe of certificate for t e from Investments, P	his account holder: Property Rights and Roy	alties only	IT3(b) - Wit	thholding Tax on Interes	st only	IT3(b) - Both Incon	ne from Inv	vestments, F	Property	Rights, Royalti	ies and W	(ithholding	Tax on Interes	st			
Unique No.	****	****	xxxxxxxxxx			×××××××××××	*****	(XXXXXXX	XXXXXXXX	xxx		Recor	d status:	Correction			Deletion	
I3B/C/E/S Un	ique No. XXXXXXX	****	xxxxxxxxxx	XXXXXXXXXXXX	FI	CA Status:	FICA successful	No	ot FICA'd		FICA exempt		Resider	nt for tax purpo	oses:	Yes 🔿 No		n
Nature of Per	son									ials			Та	kpayer Ref No	0.			
Surname / Re	egistered Name																	
Names																		
Trading Name	9																	
ІD Туре			ID Number									Date of Bi (CCYY-MI				Passpo (e.g. So	rt Country outh Africa = 2	ZA) 🔻
Risk Indicator	:																	
Tel No					Cell No.													
Contact Emai	1																	
Physical <i>I</i>	Address																	^
	Unit No.					Complex (if a	pplicable)											
	Street No.					Street / Farm	Name											
	Suburb /District)																
	City/Town							Posta	I Code									
	()						(

Account Information	٨
Indicate the number of accounts for the account holder that you are reporting on	
Postal Address	/
	Postal Code
Partnerships	Δ
Is the account holder a partner in a partnership? Y O N O	
If 'Yes' indicate the number of partnerships for which the account holder is a partner	
IT3 Account Holder Partner Details	٨
Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	XXXXXXX Record status: Correction Deletion
I3B/C/E/S Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Resident for tax purposes: Yes O No O Unknown
Nature of Person	
Surname / Registered Name	
Names	
Trading Name	
Initials Taxpayer ref no.	
ID Type ID Number	Passport Country (e.g. South Africa = ZA)

Phy	sio	cal	A	dd	re	SS	

Unit No.	Complex (if applicable)	
Street No.	Street / Farm Name	
Suburb / District		
City/Town		Postal Code
Postal Ad	dress	

	Postal Code

IT3(b) Account Holder Financial Details Excluding Withholding Ta	ox on Interest		^				
Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX							
I3B Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX							
Account No.			Account Type				
Sharia Indicator Yes No Unknown							
Joint Account Yes No Unknown							
R Opening Balance	Account Start Date (CCYY-MM-DD)						
R Closing Balance	Account Start Date (CCYY-MM-DD)						

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IT3(b)

Credits

Debits

R March	R March	
R April	R April	
R May	R May	
R June	R June	
R July	R July	
R August	R August	
R September	R September	
R October	R October	
R November	R November	
R December	R December	
R January	R January	
R February	R February	
Income and Payments		
Nature of Income - Source Code	Do you want to add another Source Code?	$Y \bigcirc N \bigcirc$
R Total income accrued	Do you want to add an additional Account?	Y O N O
R Foreign Tax paid		

IT3(b)

IT3(b)

IT3(b) Account Holder Financial Details – Withholding Tax on Interest (WTI)		^	
	Record status: Correction Deletion		
I3B Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX			
Account No.	Account Type		
Sharia Indicator Yes No Unknown			(H)CTI
Joint Account Yes No Unknown			
Nature of Income - Source Code 4201			
R WTI Gross Interest Paid / Due and Payable WTI Exemption Claimed ▼	R WTI Rand Value		
	WTI % App		
		NO	
	Do you want to add an additional Account? Y	N O	
IT3(c) Account Holder Financial Details		^	
	Record status: Correction Deletion		
I3C Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX			
Account No.	Account Type		IT3(c)
Asset Description			
Nature of Income - Source Code Units Sold	R Proceeds		
Sharia Indicator Yes O No O Unknown O	R Base Cost		
Joint Account Yes O No O Unknown O	R Gain / Loss		
Balance of units	R Balance of units value		

IT3(e) Account Holder Financial Details					۸
Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	****	****	Record status: Correction	Deletion	
I3E Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Nature of Income - Source Code	Reference number			
Units Sold					
R Gross Proceeds					
R Net Proceeds	Accrual / Payment date (CCYY-MM-DD)				
Submission period: 1 March – 31 August 1 March – 28/29 February					
Nature of bonus			R Bonus amount		
T3(s) Account Holder Financial Details					۸
Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	*****		Record status: Correction	Deletion	
I3S Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX					
Account No.				Account Type	
Sharia Indicator Yes No Unknown					
R Net Return on Investment	Net Return on Investment- Source Code				
R Interest	Interest - Source Code				
R Dividends	Dividends - Source Code				
R Capital gain / loss	Capital - Source Code				
		J			
R Other	Other - Source Code	4257			
R Other R Market Value at End of Submission Period	Other - Source Code	4257			
	Other - Source Code Account Start Date (CCYY-MM-DD)	4257	Transaction Value Total Indicator? (Used for Account Holder Transactional Del section)	tail Y ◯	N O

IT3(s) Account Holder Transactional Details	^
Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Record status: Correction Deletion
I3S Unique No. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Transaction Type
Assigned - Source Code	Do you want to add an additional Transaction record? $\ \ Y \ \ N \ \ O$
R Transaction Value	